

CLAIMS

What is claimed is:

- 1 1. A method for generating forecast information corresponding to an
- 2 organization, comprising:
 - 3 inputting hierarchy data defining a hierarchy structure of the organization,
 - 4 including data identifying a hierarchical position of members of the organization;
 - 5 inputting forecast data corresponding to members of the organization;
 - 6 defining visibility rules that specify the forecast data that are visible to each
 - 7 member of the organization; and
 - 8 enabling a forecast to be generated for any member of the organization for
 - 9 which a forecast is applicable, wherein each forecast that is generated is based on
 - 10 forecast data that are visible to the member to whom that forecast corresponds as
 - 11 specified by the visibility rules.
- 1 2. The method of claim 1, wherein the hierarchy structure comprises a plurality
- 2 of management levels; further comprising:
 - 3 defining visibility rules that specify the forecast data that are visible to each
 - 4 management level of the organization; and
 - 5 enabling a forecast to be generated for any management level of the
 - 6 organization, wherein each forecast that is generated is based on forecast data that
 - 7 are visible to the management level for which that forecast corresponds as specified
 - 8 by the visibility rules.

1 3. The method of claim 1, wherein a forecast is generated for a manager and
2 wherein the visibility rules include a maximum hierarchy depth search value n
3 defining a search scope such that the forecast for the manager is generated from
4 the manager's own forecast data and from forecast data corresponding to members
5 of the organization who are defined to be both subordinate to the manager and
6 occupy a management level in the hierarchy that is $\leq n$ levels below a
7 management level occupied by the manager.

1 4. The method of claim 1, further comprising:
2 creating a forecast series comprising a set of parameters that define
3 attributes of forecasts that are based thereon; and
4 using the set of parameters in the forecast series to generate the forecast.

1 5. The method of claim 4, wherein the set of parameters in the forecast series
2 include parameters that define the visibility rules for forecasts that are based on the
3 forecast series.

1 6. The method of claim 1, further comprising:
2 enabling a member of the organization to submit a forecast to a superior; and
3 preventing the member from modifying the forecast after it has been
4 submitted.

1 7. The method of claim 6, further comprising enabling the superior to which the
2 forecast was submitted and/or a system administrator to unsubmit the forecast such
3 that the member who submitted that forecast is enabled to modify the forecast.

1 8. The method of claim 1, further comprising presenting forecast data in a
2 graphical format that enables a member to compare forecast data corresponding to
3 related forecasts over time that are specified to be visible to that member.

1 9. A method for generating and presenting forecast information, comprising:
2 inputting hierarchy data defining members of an organization and a
3 hierarchical position held by each member;
4 inputting sets of forecast data, each set of forecast data corresponding to a
5 respective member of the organization;
6 generating a forecast for a manager member of the organization based on a
7 set of forecast data corresponding to the manager and at least one set of forecast
8 data corresponding to one or more subordinates, each subordinate being a member
9 of the organization who has a hierarchical position that is defined to be subordinate
10 to manager by the hierarchy data; and
11 presenting information pertaining to the forecast in a manner that enables the
12 manager to view the set of forecast information for the manager and sets of forecast
13 data for each subordinate in both aggregated and separated formats.

1 10. The method of claim 9, further comprising enabling the manager to adjust
2 values of data pertaining to a set of forecast data corresponding to a subordinate
3 such that the forecast for the manager considers the adjusted values rather than
4 original values of the data that are adjusted.

1 11. The method of claim 10, wherein the original values of any data that are
2 adjusted are preserved such that the subordinate is enabled to see only the original
3 values and not the adjusted values in the subordinate's set of forecast data.

1 12. The method of claim 10, further comprising providing a forecast adjustment
2 history mechanism that enables the manager to view a historical record of
3 adjustments made to the set of forecast data pertaining to the manager's forecast
4 and sets of forecast data pertaining to said one or more subordinates of the
5 manager.

1 13. The method of claim 10, further comprising enabling a superior of the
2 manager to view both the original and adjusted values of the values adjusted by the
3 manager.

1 14. A method for generating and presenting forecast information, comprising:
2 inputting hierarchy data defining members of an organization and a
3 hierarchical position held by each member;
4 inputting forecast data corresponding to members of the organization;
5 determining an identity of a current forecast participant who is a member of
6 the organization;
7 identifying members of the organization who are subordinate to the current
8 forecast participant based on the hierarchy data;
9 generating forecasts for one or more members of the organization who are
10 identified as being subordinate to the current forecast participant; and
11 presenting forecast data to the current forecast participant such that the
12 current forecast participant may view forecast data specific to each of said one or
13 more subordinate members and view forecast data that are aggregated across the
14 forecasts of said one or more subordinate members.

1 15. The method of claim 14, wherein the current forecast participant is a
2 manager whose forecast is determined, at least in part, on forecasts that are
3 submitted by one or more selected members of the organization who are
4 subordinate to the manager, further comprising:

5 automatically generating a forecast for any member among said one or more
6 selected members who has yet to submit a forecast; and

7 generating a forecast for the manager based on a combination of forecasts
8 submitted by said one or more selected members and any forecast that are
9 automatically generated.

1 16. The method of claim 15, wherein the manager occupies at least a second
2 level of management in the organization's hierarchy and automatically calculating
3 forecasts for said one or more selected members of the organization who are
4 subordinate to the manager and have not submitted their forecast is applied in a
5 recursive manner from lower levels to higher levels in the organization's hierarchy.

1 17. A machine-readable media on which a plurality of machine-executable
2 instructions are stored that when executed by a machine generates forecast
3 information corresponding to an organization by performing the operations of:

4 enabling hierarchy data defining a hierarchy structure of the organization to
5 be entered into the machine, including data identifying a hierarchical position of
6 members of the organization;

7 enabling forecast data corresponding to members of the organization to be
8 input into the machine;

9 enabling visibility rules that specify the forecast data that are visible to each
10 member of the organization to be entered into the machine; and

11 enabling a forecast to be generated for any member of the organization for
12 which a forecast is applicable, wherein each forecast that is generated is based on
13 forecast data that are visible to the member to whom that forecast corresponds as
14 specified by the visibility rules.

1 18. The machine-readable media of claim 17, wherein the hierarchy structure
2 comprises a plurality of management levels and wherein execution of the machine
3 instructions further performs the operations of:

4 enabling visibility rules that specify the forecast data that are visible to each
5 management level of the organization to be entered into the computer; and

6 enabling a forecast to be generated for any management level of the
7 organization, wherein each forecast that is generated is based on forecast data that
8 are visible to the management level for which that forecast corresponds as specified
9 by the visibility rules.

1 19. The machine-readable media of claim 17, wherein a forecast is generated for
2 a manager and wherein the visibility rules include a maximum hierarchy depth
3 search value n defining a search scope such that the forecast for the manager is
4 generated from the manager's own forecast data and from forecast data
5 corresponding to members of the organization who are defined to be both
6 subordinate to the manager and occupy a management level in the hierarchy that is
7 $\leq n$ levels below a management level occupied by the manager.

1 20. The machine-readable media of claim 17, wherein execution of the machine
2 instructions further performs the operations of:

3 enabling a forecast series comprising a set of parameters that define
4 attributes of forecasts that are based thereon to be entered into the machine; and
5 using the set of parameters in the forecast series to generate the forecast.

1 21. The machine-readable media of claim 20, wherein the set of parameters in
2 the forecast series include parameters that define the visibility rules for forecasts
3 that are based on the forecast series.

1 22. The machine-readable media of claim 17, wherein execution of the machine
2 instructions further performs the operations of:
3 enabling a member of the organization to submit a forecast to a superior; and
4 preventing the member from modifying the forecast after it has been
5 submitted.

1 23. The machine-readable media of claim 22, wherein execution of the machine
2 instructions further perform the operation of enabling the superior to which the
3 forecast was submitted and/or a system administrator to unsubmit the forecast such
4 that the member who submitted that forecast is enabled to modify the forecast.

1 24. The machine-readable media of claim 17, wherein execution of the machine
2 instructions further perform the operation of presenting forecast data in a graphical
3 format that enables a member to compare forecast data corresponding to related
4 forecasts over time that are specified to be visible to that member.

1 25. A machine-readable media on which a plurality of machine-executable
2 instructions are stored that when executed by a machine generates and presents

3 forecast information corresponding to an organization by performing the operations
4 of:

5 enabling hierarchy data defining members of an organization and a
6 hierarchical position held by each member to be entered into the machine;

7 enabling sets of forecast data to be input into the machine, each set of
8 forecast data corresponding to a respective member of the organization;

9 generating a forecast for a manager member of the organization based on a
10 set of forecast data corresponding to the manager and at least one set of forecast
11 data corresponding to one or more subordinates, each subordinate being a member
12 of the organization who has a hierarchical position that is defined to be subordinate
13 to manager by the hierarchy data; and

14 presenting information pertaining to the forecast in a manner that enables the
15 manager to view the set of forecast information for the manager and sets of forecast
16 data for each subordinate in both aggregated and separated formats.

1 26. The machine-readable media of claim 25, wherein execution of the machine
2 instructions further perform the operation of enabling the manager to adjust values
3 of data pertaining to a set of forecast data corresponding to a subordinate such that
4 the forecast for the manager considers the adjusted values rather than original
5 values of the data that are adjusted.

1 27. The machine-readable media of claim 26, wherein the original values of any
2 data that are adjusted are preserved such that the subordinate is enabled to see
3 only the original values and not the adjusted values in the subordinate's set of
4 forecast data.

1 28. The machine-readable media of claim 26, wherein execution of the machine
2 instructions further perform the operation of providing a forecast adjustment history
3 mechanism that enables the manager to view a historical record of adjustments
4 made to the set of forecast data pertaining to the manager's forecast and sets of
5 forecast data pertaining to said one or more subordinates of the manager.

1 29. The machine-readable media of claim 26, wherein execution of the machine
2 instructions further perform the operation of enabling a superior of the manager to
3 view both the original and adjusted values of the values adjusted by the manager.

1 30. A machine-readable media on which a plurality of machine-executable
2 instructions are stored that when executed by a machine generates and presents
3 forecast information corresponding to an organization by performing the operations
4 of:

5 enabling hierarchy data defining members of an organization and a
6 hierarchical position held by each member to be input into the machine;

7 enabling forecast data corresponding to members of the organization to be
8 input into the machine;

9 determining an identity of a current forecast participant who is a member of
10 the organization;

11 identifying members of the organization who are subordinate to the current
12 forecast participant based on the hierarchy data;

13 generating forecasts for one or more members of the organization who are
14 identified as being subordinate to the current forecast participant; and

15 presenting forecast data to the current forecast participant such that the
16 current forecast participant may view forecast data specific to each of said one or

17 more subordinate members and view forecast data that are aggregated across the
18 forecasts of said one or more subordinate members.

1 31. The machine-readable media of claim 30, wherein the current forecast
2 participant is a manager whose forecast is determined, at least in part, on forecasts
3 that are submitted by one or more selected members of the organization who are
4 subordinate to the manager, and wherein execution of the machine instructions
5 further performs the operations of:

6 automatically generating a forecast for any member among said one or more
7 selected members who has yet to submit a forecast; and
8 generating a forecast for the manager based on a combination of forecasts
9 submitted by said one or more selected members and any forecast that are
10 automatically generated.

1 32. The machine-readable media of claim 31, wherein the manager occupies at
2 least a second level of management in the organization's hierarchy and
3 automatically calculating forecasts for said one or more selected members of the
4 organization who are subordinate to the manager and have not submitted their
5 forecast is applied in a recursive manner from lower levels to higher levels in the
6 organization's hierarchy.